Title: Administrative Services – Foreign Travel

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1. **POLICY**:

a. The Office of Management and Information, Executive Services Office will manage all foreign travel requests for the Office of Environmental Management (EM).

2. <u>OBJECTIVES</u>:

a. To establish EM policies and procedures governing official foreign travel by Federal and contractor employees based on DOE Order 551.1A and any subsequent revisions.

3. APPLICABILITY:

a. The provisions of this procedure will apply to all DOE Federal employees from Headquarters and field offices, and all contractor and subcontractor employees participating in the EM foreign travel program.

4. <u>REFERENCES</u>:

- a. Official Foreign Travel, DOE Order 551.1A, http://www.directives.doe.gov/pdfs/doe/doetext/neword/551/o5511a.pdf
- b. User Guide for Preparing Country Clearance Telegrams
- c. Foreign Travel Management System (FTMS) User Guide and Training Modules

5. <u>CONTACT</u>:

a. Pattie Agee, EM 7.2, (202) 586-9417, fax number (202) 586-8429, pattie.agee@em.doe.gov

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6. <u>DEFINITIONS</u>:

- a. **Country Clearance:** Notification from the U.S. Embassy that a written request to travel to their country has been approved.
- b. **Deputy Chief of Staff of the Department (DCOS):** For purposes of the DOE foreign travel order, serves as head of the organization and, in that capacity, approves and authorizes Office of the Secretary travel.
- c. **DOE Foreign Travel Board:** This board conducts quarterly meetings related to foreign travel policy.
- d. **EM Foreign Travel Coordinator (FTC):** Serves as the point-of-contact for all EM Field and Headquarters foreign travel for federal and contractor employees.
- e. **EM Policy Administrator:** Serves as the Office of Management and Information Administrator for all Standing Operating Policies and Procedures (SOPP).
- f. **Field Office Foreign Travel:** Foreign travel received from the field offices for federal and contractor employees.
- g. **Foreign Travel Management System (FTMS):** The official Departmental system for tracking, monitoring and reporting on foreign travel by Federal and contractor employees.
- h. **Foreign Travel Plan (FTP):** An EM "management tool" plan prepared on a semi-annual basis that includes projected foreign travel trips from Headquarters and the field.
- i. **Form 551.1:** The official form that is used for signature approval after the necessary information is entered into the Foreign Travel Management System (FTMS).

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- j. **Head of Organization:** The head official of the organization that employs the traveler.
- k. **Headquarters Foreign Travel:** Foreign travel received from Headquarters federal and contractor employees.
- 1. **Non-Sensitive Country:** Determined by the security situation between the United States (US) and that country. The Department of Energy, Office of Nuclear Transfer and Supplier Policy defines for DOE whether a country is non-sensitive.
- m. **Official Foreign Travel:** Approved travel from the U.S. to a foreign country and return, travel between foreign countries by persons, including foreign nationals, whose salaries or travel expenses or both will ultimately be funded in whole or in part by DOE or NNSA from its appropriations. Official travel also includes travel funded by non-DOE or non-NNSA sources for which the traveler represents the Department or NNSA or conducts business on behalf of the U.S. Government.
- n. **Responsible Program Secretarial Officer (RPSO):** The senior DOE Headquarters official whose office will fund the requested travel, or if there is no DOE funding, the official having programmatic responsibilities associated with the requested travel. For Headquarters employees, this may be the same person as the head of organization.
- o. **Sensitive Country:** A country to which particular consideration is given for policy reasons. Countries may appear on the sensitive country list for reasons of national security, nuclear nonproliferation, regional instability, threat to national economic security, or terrorism support. The Office of Defense Nuclear Nonproliferation maintains this list.

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- p. **Sensitive Subjects:** Unclassified subjects and topics identified in existing Federal regulations governing export control as well as those identified by the Department as unique to its work, which involve information, activities, and/or technologies that are relevant to national security. The Office of Defense Nuclear Nonproliferation maintains this list.
- q. **Trip Report:** A report that summarizes the results of a foreign travel trip, including a breakdown of actual costs and is required within 30 days after return of a trip.
- r. **Trip Request:** An FTMS report that contains all administrative information relevant to a particular trip including, but not limited to, traveler, trip, itinerary, comments, justifications, current status and cost information.

7. <u>REQUIREMENTS</u>:

- a. Monitoring
 - i. The EM Policy Administrator will conduct periodic reviews to evaluate these procedures to ensure compliance with established/approved policy.
 - ii. A copy of the findings shall be submitted to the Director, Office of Management and Information and, when necessary, a Corrective Action Plan will be formulated.

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b. Records

- i. The EM Foreign Travel Coordinators will maintain a copy of the following files generated by this procedure for a period of two (2) years:
 - (1) All closed and archived foreign travel packages
 - (2) All foreign travel correspondence
 - (3) All country clearance cables
- ii. All foreign travel documents will be sent to the EM Central Records Facility for life-cycle records management, after two years at six-month intervals.

c. Training

i. The EM Foreign Travel Coordinator is required to complete FTMS and Country Clearance Cable training, which is provided by the Office of Foreign Visits, Assignments and Travel (SO-30).

8. <u>ROLES & RESPONSIBILITIES:</u>

- a. Executive Services Team
 - i. Responsible for providing administrative services relating to all foreign travel to the Office of Environmental Management.

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b. Executive Services Team Leader

- i. Leads and directs the work of the EM Executive Services Team.
- ii. Reviews reporting requirements associated with foreign travel, identifies weaknesses, and advises the Director, Office of Management and Information of any need to change policy and/or procedures.
- iii. Coordinates with the EM Deputy Assistant Secretaries (DASs) to identify and resolve any problems associated with foreign travel preparation and timeliness.
- iv. Ensures the overall timeliness and quality of EM foreign travel.

c. EM Foreign Travel Coordinators

- i. Manages the day-to-day operations of EM=s foreign travel to ensure that the policies and procedures are adhered to on all trip requests.
- ii. Serves as the point-of-contact for all matters related to EM foreign travel.
- iii. Responsible for keeping the Team Leader informed of the status on all pending trips on a weekly basis or more frequently, if necessary.
- iv. Responsible for ensuring that all procedures and requirements are met before foreign travel trip requests are forwarded to EM management for review and approval.
- v. In collaboration with the Executive Services Team Leader, responsible for review and providing recommendations to EM management on all trip requests.

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- vi. Ensures that EM management is aware of the time constraints of each trip request so that their review is processed in a timely manner and dates of travel can be met.
- vii. Responsible for preparing the country clearance cables and coordinating with the Department of State (DOS) in a timely manner and in compliance with DOS rules and regulations.
- viii. Responsible for entering final approvals in the FTMS upon approval of the country clearance cable by the Embassy.
- ix. Responsible for initiating the request for semi-annual projected foreign travel trips from the Field Managers and Headquarters Deputy Assistant Secretaries and preparing the proposed EM Foreign Travel Plan.
- x. Responsible for the coordination and processing of all trip requests until they are closed in the FTMS.
- xi. Responsible for providing additional information and/or answers to questions requested by EM management.
- xii. Responsible for developing the foreign travel Standing Operating Policies and Procedures (SOPP) document.
- xiii. Represents EM as a member of the Departmental Foreign Travel Board at quarterly meetings.
- xiv. Responsible for ensuring that necessary training is provided to Foreign Travel FTMS users.
- xv. The EM Foreign Travel Coordinator answers questions on foreign travel policies and procedures.

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d. Deputy Assistant Secretaries (DAS)

- i. Submit projected foreign travel trip requests to EM-7 Executive Services Team semi-annually for the Foreign Travel Plan (FTP). The FTP is considered a "management tool," providing EM management with a "snapshot" of the extent of upcoming foreign travel. The DAS is responsible for ensuring that all trips are relevant to the EM cleanup mission.
- ii. Responsible for ensuring that travelers under their purview submit the required 11-point justification memo, signed by the DAS (see Appendix A), and other foreign travel documentation to EM-7 Executive Services Team in time to meet the EM requirement of 45 days advance notification. This requirement does not make a distinction between travel to sensitive and non-sensitive countries.
- iii. Ensure that if a trip is deemed as Work-for-Others that the travelers under their purview will submit a copy of the contract supporting that work.
- iv. Ensure that travelers under their purview adhere to the EM policy of 1 personal leave day for every 2 days of official business. This 2:1 ratio is exclusive of weekends. Travel requests with excessive personal leave will not be submitted to the Assistant Secretary for Environmental Management for approval.
- v. Ensure that travel requests for business, premium or first class are not submitted to the Assistant Secretary for EM for approval.
- vi. Review and provide concurrence on trip requests under their purview. If the DAS non-concurs, the trip request will not be submitted to the Assistant Secretary for Environmental Management for further processing.

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- vii. Ensure that travelers under their purview provide additional information to the EM-7 Executive Services Team as required (see Appendix B).
- viii. Ensure that travelers under their purview provides Part II of the trip report, with specific requirements requested by the Assistant Secretary for Environmental Management to the EM FTC within 30 days after travel (see Appendix C).

e. Field Office Managers

- i. Submit projected foreign travel trip requests to EM-7 Executive Services Team semi-annually for the Foreign Travel Plan (FTP). The FTP is considered a "management tool," providing EM management with a "snapshot" of the extent of upcoming foreign travel. The Field Office Manager is responsible for ensuring that all trips are relevant to the EM cleanup mission.
- ii. Ensure that <u>all</u> foreign travel for EM sites will be submitted to Headquarters for approval. This includes overhead and program funding, and Work-for-Others (indirect).
- iii. Ensure that if a trip is deemed as Work-for-Others that a copy of the contract supporting that work is provided to Headquarters.
- iv. Ensure that travelers submit the required 11-point justification memo, signed by the Manager (see Appendix A), and other foreign travel documentation for all field Federal and contractor employees traveling under their purview to Headquarters in time to meet the EM requirement of 45 days advance notification. This requirement does not make a distinction between travel to sensitive and non-sensitive countries.

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- v. Ensure that travelers under their purview adheres to the EM policy of 1 personal leave day for every 2 days of official business. The 2:1 ratio is exclusive of weekends. Travel requests with excessive personal leave, will not be submitted to the Assistant Secretary for Environmental Management for approval.
- vi. Ensure that requests for business, premium or first class are not submitted to EM Headquarters for the Assistant Secretary for Environmental Management approval.
- vii. Ensure that travelers under their purview provide additional information to Headquarters, as required (see Appendix B).
- viii. Ensure that travelers, under their purview, provides Part II of the trip report, with specific requirements requested by the Assistant Secretary for Environmental Management, to the EM FTC within 30 days after travel (see Appendix C).

f. Federal and Contractor Travelers

- i. Ensure that the mandatory information for the Request for Official Foreign Travel (Form 551.1) is entered in the FTMS and the necessary signature (s) are obtained.
- ii. Ensure that all required foreign travel documentation is submitted to Headquarters in time to meet the EM requirement of 45 days advance notification. This requirement does not make a distinction between travel to sensitive and non-sensitive countries.
- iii. Ensure that if a trip is deemed as Work-for-Others that a copy of the contract supporting that work is submitted.

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- iv. Adhere to the EM policy of 1 personal leave day for every 2 days of official business. The 2:1 ratio is exclusive of weekends.
- v. Ensure that travel requests for business, premium or first class are not submitted to the Assistant Secretary for Environmental Management for approval.
- vi. Must have a copy of the approved country clearance cable when traveling on official business.
- vii. Ensure that the EM FTC is notified if an approved trip has been cancelled.
- viii. Ensure that additional information is submitted to the EM-7 Executive Services Team as required (**see Appendix B**).
- ix. Prepare and submit Part II of the trip report, with specific requirements requested by the Assistant Secretary for Environmental Management, to the EM FTC within 30 days after travel (see Appendix C).
- g. Office of the Chief Operating Officer for Environmental Management (EM-3)
 - i. Reviews and recommends approval/disapproval of foreign travel trip requests to ensure all trips requested are relevant to the EM cleanup mission before being submitted to the Assistant Secretary for Environmental Management for final approval.
 - ii. Ensures that trip requests are provided to the Executive Services Team in a timely fashion after review (1 to 2 days of review).
- h. Office of the Assistant Secretary for Environmental Management (EM-1)
 - i. Approves or disapproves foreign travel trip requests submitted from EM

Headquarters and Field Office Federal and contractor travelers.

ii. Ensure that trip requests are approved in an appropriate time frame so that all travel can be processed without delay (2 weeks of review).

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9. <u>PROCEDURES</u>:

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- a. Field Office Process:
 - i. The Field Office Manager submits semiannual forecast of upcoming trip requests to the EM FTC as required by EM-1.
 - ii. Upon receipt of all Field Office trip requests, the EM FTC prepares the EM Foreign Travel Plan (FTP). The final FTP is considered a "management tool," providing EM management with a "snapshot of the extent of upcoming foreign travel trips.
 - iii. The EM FTC submits the draft FTP to the Executive Services Team Leader for review and comments.
 - iv. The Executive Services Team Leader returns the draft FTP to the EM FTC for further processing and revisions, if needed.
 - v. The EM FTC submits the draft FTP to the Deputy Assistant Secretaries for review and comments.
 - vi. The EM FTC revises FTP based on comments from the DASs.
 - vii. The EM FTC provides a copy of the final FTP to EM-1, EM-3, DASs, Field Managers and the Field Point-of-Contact (POC).

NOTE: Trip requests not known during the preparation of the FTP

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can be submitted to Headquarters for processing and will be reviewed by EM-1 on a case-by-case basis.

- viii. The Field POC or traveler inputs the required information in the FTMS and submits Form 551.1 and the information to prepare the required country clearance cable to Headquarters for processing. When travel includes a delegation, all trip requests must be submitted together for EM-1 approval.
- ix. The Field POC submits the signed 11-point justification memo addressed to the Assistant Secretary for Environmental Management, and other required documentation, to the EM Headquarters Foreign Travel Coordinator.
- **x.** The EM FTC prepares a foreign travel package that includes all the submitted information and reviews to verify accuracy of documentation.
- xi. The EM FTC forwards trip request to the appropriate DAS for review and concurrence (1 day of review).
- xii. After concurrence, the DAS forwards to the EM FTC. If the DAS non-concurs, the trip request will not be submitted for further processing. The trip request will be disapproved and closed in the FTMS.
- xiii. If the DAS concurs, the EM FTC forwards to the EM-7 Executive Services Team Leader for review.
- xiv. After the Executive Services Team Leader review, the EM FTC forwards to the Chief Operating Officer, EM-3 (1 to 2 days of review).
- xv. After EM-3 review/concurrence, the EM FTC forwards to the Assistant Secretary for Environmental Management for approval.

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- xvi. Upon approval or disapproval, the Office of the Assistant Secretary for Environmental Management (EM-1), forwards to the EM FTC.
- xvii. The EM FTC notifies Field point-of-contact and/or traveler of trip approval or disapproval.
- xviii. If disapproved by EM-1, the EM FTC enters disapproval in the FTMS. The trip is then closed in the FTMS.
- xix. If approved by EM-1, the EM FTC prepares the mandatory country clearance cable and provides to the State Department for comments and approval.
- xx. The State Department notifies the EM FTC of revisions and/or approval of the cable.
- xxi. The EM FTC finalizes the cable and provides an original copy to the State Department Communications Center for further processing to the appropriate Embassy for approval.
- xxii. The State Department and Embassy notifies the EM FTC of approval and provides a copy of the approved cable.
- xxiii. Upon receipt of the approved cable, the EM FTC enters the Assistant Secretary for Environmental Management's approval in the FTMS.
- xxiv. The EM FTC notifies the Field POC and/or traveler when the cable has been approved by Embassy. A copy of the approved cable is provided to the POC and/or traveler prior to departure (copy should be carried with traveler while on official business).
- xxv. Upon return from the trip, Federal and contractor traveler prepares Part II

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of the trip report, which includes specific requirements from the Assistant Secretary for Environmental Management and submits report to the EM FTC.

- xxvi. The EM FTC submits report to the Assistant Secretary for Environmental Management.
- xxvii. The Field POC inputs the actual cost of travel in the FTMS. If the actual cost exceeds 25% of the estimated cost entered in the FTMS, the trip must be resubmitted to Headquarters for reapproval by the Assistant Secretary for Environmental Management.

NOTE: Field POC should refer to the Departmental Foreign Travel Order for additional reasons for resubmittal of trips.

xxviii. The Field POC will enter an abstract summary of the trip and close the trip in the FTMS.

- b. Headquarters (EM) Foreign Travel Process:
 - i. Deputy Assistant Secretaries submits semiannual forecast of upcoming trip requests for EM FTC as required by EM-1.
 - ii. Upon receipt of all DAS trip requests, the EM FTC prepares the EM Foreign Travel Plan (FTP). The final FTP is considered a "management tool," providing EM management with a "snapshot" of the extent of upcoming foreign travel.
 - iii. The EM FTC submits the draft FTP to the Executive Services Team Leader for review and comment.
 - iv. After review, the Executive Services Team Leader returns the draft FTP to

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the EM FTC for further processing and revisions, if needed.

- v. The EM FTC submits the draft FTP to the Deputy Assistant Secretaries (DAS) for review and comment.
- vi. The EM FTC revises the FTP based on comments from the DASs.
- vii. The EM FTC provides a copy of the final FTP to EM-1, EM-3, DASs, Field Managers and the Field Point-of-Contact (POC).

NOTE: Trip requests not known during the preparation of the FTP can be submitted to Headquarters for processing and will be reviewed by EM-1 on a case-by-case basis.

- viii. Federal and contractor travelers e-mail or fax the EM FTC the required information for upcoming trip as stated in Appendices A&B. When travel includes a delegation, all trips must be submitted together for EM-1 approval.
- ix. The EM FTC enters information into the Foreign Travel Management System (FTMS).
- x. The EM FTC prepares a travel package that includes all the information submitted and reviews to verify accuracy of documentation.
- xi. The EM FTC forwards trip request to the appropriate DAS for review and concurrence (1 day of review).
- xii. After concurrence, the DAS forwards to the EM FTC. If the DAS nonconcurs, the trip request will not be submitted for further processing. The trip request will be disapproved and closed in the FTMS.

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- xiii. If the DAS concurs, and the traveler is an EM Headquarters Federal employee using non-federal source funds, the EM FTC submits a copy of the traveler's signed Travel Authorization (TA), invitation letter, FTMS form 551.1 and the non-federal source form, signed by the DAS, to the Office of General Counsel (GC) for concurrence.
- xiv. After GC concurrence is received for EM Headquarters travelers using non-federal source funds, the EM FTC forwards to the EM-7 Executive Services Team Leader for review.
- xv. After the Executive Services Team Leader review, the EM FTC forwards to the Chief Operating Officer, EM-3 (1 to 2 days of review).
- xvi. After EM-3 review/concurrence, the EM FTC forwards to the Assistant Secretary for Environmental Management for approval.
- xvii. Upon approval or disapproval, the Office of the Assistant Secretary for Environmental Management (EM-1), forwards to the EM FTC.
- xviii. The EM FTC notifies EM Headquarters point-of-contact and traveler of trip approval or disapproval.
- xix. If disapproved by EM-1, the EM FTC enters disapproval in the FTMS. The trip is then closed in FTMS.
- xx. If approved by EM-1, the EM FTC prepares the mandatory country clearance cable and provides to the State Department for comments and approval.
- xxi. The State Department notifies the EM FTC of revisions and/or approval of the cable.

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- xxii. The EM FTC finalizes the cable and provides an original copy to the State Department Communications Center for further processing to the appropriate Embassy for approval.
- xxiii. The State Department and Embassy notifies the EM FTC of approval and provides a copy of the approved cable.
- xxiv. Upon receipt of the approved cable, the EM FTC enters the Assistant Secretary for Environmental Management's approval in the FTMS.
- xxv. The EM FTC provides a copy of the approved cable and a copy of the Form 551.1 to the EM Headquarters point-of-contact and/or traveler prior to departure.
- xxvi. Upon return from the trip, Federal and contractor traveler prepares Part II of the trip report, with specific requirements requested by the Assistant Secretary for Environmental Management, and submits report to the EM FTC.
- xxvii. The EM FTC submits trip report to the Assistant Secretary for Environmental Management.
- xxviii. The EM FTC inputs the actual cost of the trip in the FTMS.
- xxix. The EM FTC resubmits trip request to the Assistant Secretary for reapproval if the actual cost exceeds 25% of the estimated cost entered into the FTMS, and if trip requests meets any of the other reasons listed in the Departmental Foreign Travel Order for trip resubmitals.
- xxx. The EM FTC enters abstract summary of the trip in the FTMS and closes the trip in the FTMS.

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NOTE: All issues not addressed in these procedures (i.e., security briefings, export, control, counter intelligence briefings) are governed by DOE Order 551.1A.

10. APPENDICES:

- a. Eleven-point justification memo
- b. Country Clearance Cable Information Requirements
- c. Jessie Roberson memo (dated October 3, 2002), subject: Foreign Travel Reporting Requirement

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Approving Official:

Jessie Hill Roberson
Assistant Secretary for

Environmental Management

april 28, 2003

Date:

To: Jessie Hill Roberson, EM-1 From: DAS or Field Office Manager

Date:

Re: Request for Approval of Foreign Travel

This memo serves to request your approval for foreign travel to be conducted by personnel traveling under your cognizance.

Identify the traveler-s name, title and organizational affiliation.

The body of the memo must address, in detail, the following questions:

- 1. Is this trip on the Foreign Travel Plan? If not, why?
- 2. Is the trip being requested less than 45 days in advance? If so, why?
- 3. What program activity is supported by this trip?
- 4. What is the purpose/objective of the trip?
- 5. Provide discussion if this trip is part of an on-going initiative.
- 6. Who are the Field and Headquarters program managers for this trip?
- 7. How does the trip contribute to the mission of the traveler=s organization and the overall EM mission?
- 8. Who is the funding organization and what is the estimated cost of the trip?
- 9. Identify additional delegation members. If the trip is comprised of multiple travelers, what is the role of each participant under your purview?
- 10. Provide discussion of the impacts to meeting EM mission requirements if this trip is not conducted.
- 11. Has every effort been made to reduce costs associated with this trip?

Country Clearance Cable Informational Requirements

Full Name:		
Employer:		
Organization:		
Title:		
Date of Birth:		
Passport Number:		
Passport Expiration Date:		
Citizenship:		
Clearances Held:		
Emergency Contact Name/Phone		
Traveling with Delegation? (If YES, list members)	YES	NO
Purpose of Travel:		
In Country Point of Contact (Name, and ph	none numbers for day and n	night)
Is Embassy Assistance Being Requested?	If yes, what for?	
Daily Itinerary:		

OTHER INFORMATION NEEDED

- 1. Copy of Agenda
- 2. Presentation (if presenting a paper or speech)
- 3. Copy of funding letter (if trip is being funded by outside source, i.e., IAEA, DOD, etc.)
- 4. List of attendees for trip (if more than one, specifically if other agencies or DOE program offices are participating)
- 6. Copy of contract (if deemed as Work-For-Others)



Department of Energy

Washington, DC 20585

October 3, 2002

MEMORANDUM FOR DISTRIBUTION

FROM:

ÍJÉSSÍÉ HILL RÓBERSON ASSISTANT SECRETARY FOR

ENVIRONMENTAL MANAGEMENT

SUBJECT:

FOREIGN TRAVEL REPORTING REQUIREMENT

Effective immediately, all personnel traveling internationally for EM should prepare a trip report and provide that report to me within 30 days of their return from travel.

Attached is the format for the report. The report should not exceed two pages in length. Submission of the report will satisfy the requirements of DOE Order 551.1A as they relate to Part 2 of the trip report.

Please provide your reports by e-mail to Pattie Agee at <u>pattie agee@em.doe.gov</u>. If you have questions about the requirement or the Order, please contact Ms. Agee at (202) 586-9417.

Attachment

Distribution:

Warren E. Bergholz, Jr., Acting Manager, Idaho Operations Office (ID)

Jack R. Craig, Deputy Manager, Ohio Field Office (OH)

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Mark Frei, Acting Deputy Assistant Secretary, EM-40

James M. Owendoff, Deputy Assistant Secretary, EM-50

OFFICE OF ENVIRONMENTAL MANAGEMENT FOREIGN TRAVEL TRIP REPORT (NOT TO EXCEED TWO PAGES)

TRAVELER:
DESTINATION:
DATES OF TRAVEL:
PURPOSE OF TRAVEL:
SPECIFIC ROLE IN ACTIVITY:
EM MESSAGE CONVEYED:
FACILITIES VISITED/CONTACTS MADE:
OBSERVATIONS:
RESULTS ACHIEVED:
COMMITMENTS MADE:
FOLLOW-UP ACTIVITY: